

Needs Assessment Interview Tool

Instructions and Questionnaire



Needs Assessment Interview Tool

Instructions

The Requirements Development process begins with an assessment of the client's needs. The Needs Assessment Interview Tool (NAIT) creates the framework for a conversation with the client to understand their needs by suggesting probing questions in a number of areas that have proven critical to project success. It is not intended to be sent to the client to be filled out on their own. Such a short-cut may prove to be counter-productive both in eliciting the required information and in building a productive client relationship.

The exact steps and level of detail required on each individual project varies based on the complexity of the project, the needs and receptiveness of the client, and the estimated value of a potential change. Additionally, the questions provided in this document should not be considered as a limit to the conversation but a tool to enhance it and provide a general structure. The Regional Workplace Executive (RWE) is available to help project teams assess the value a project represents and choose the direction and level of effort required.

Project Screening

The first step in the needs assessment process is to screen the potential value of the project using a quick screening process. The Project Planner and Visualization Tool (PP&VT) can assess value for different project options and can also be used to compare the current situation to a consistent "best-case" scenario. Using information from the new space request, continuing needs letter or Occupancy Agreement for the existing space, gather the proposed headcount and total useable square footage for the proposed space. Go to the project planner "Project Options Planner" tab, select "simple" baseline, and enter this information. Then, enter the following for the "best case" option:

- Individuals seated in open-plan: 80%
- Average Office / Workstation Size: 120/40SF
- Desk Sharing: 20% of headcount
- Shared Support Space Ratios: Mid
- Mission-critical, or "special" space: use actual, or, assume it is 10% of current

Note the payback period noted in the Space Standards plus Desk Sharing Tab. If the payback shown is less than the firm-term of the lease this could be a high-value project.

Consider next whether any of the following are true:

- The project is prospectus-level, or, greater than mid-size (200+ staff) if not?
- The project U/R exceeds agency or GSA-proposed space standards ranges?
- The agency requested help evaluating requirements for space efficiency?
- The project will consider a change in location?

If the project payback is within the term of the proposed OA or firm-term of a lease, AND one or more of the above is true; or, payback is estimated in less than 5 years AND the project impacts more than 25 people, then this is a “high-value” project and you should follow the “In-Depth” process. If not, this is a “standard” project and the “Standard” process is warranted. These processes define what sections of the NAIT are mandatory, and help define how to structure your approach to this particular project.

[Note: If additional information is known about the project, project teams may use the full PP&VT to do a more detailed assessment of project value. The process followed is the same as described above, the estimated payback period will simply be based on more detailed information.]

Preparing for the Needs Assessment Interview

The project manager should complete Sections I, Customer Information, and II Background Information on Current Space using the client space request, current OA, and client-facing representatives like the Regional Account Manager and Building Manager as necessary. The project manager should then gather and review all documentation included in Section III Documentation as is practical to do prior to meeting with the client. The updated NAIT should be forwarded to the client point of contact with a request to meet. Depending on whether the High-Value or Standard process is selected, the sections which will be discussed should be highlighted to give the client a heads-up on how to prepare. You should become familiar with the questions, their intent, and which you will be asking of the client prior to conducting the interview.

M - Mandatory; O - Optional

NAIT Section	New-Space Process	In-Depth Process	Standard Process
I - Customer Info	M	M	M
II - Background Info - Current Space	M	M	M
III - Documentation	M	O	O
IV - Objectives	M	M	M
V - New Space and Delineated Area	M	O	O
VI - Workspace Requirements	See Below	See Below	See Below
Business Overview	M	M	O

Individual Workspace	M	M	M
Group Workspace	M	M	M
Building Features	M	M	O
Building Support Spaces	M	M	O
VII - Parking	M	M	O
VIII - Building Operations	M	M	O
IX - Security	M	M	O
X - Additional Notes and Resources	Reference	Reference	Reference

Conducting the Needs Assessment Interview

Conduct the interview using the NAIT as a guide. Feel free to expand on questions provided, probe for additional detail, or ask additional questions depending on where the conversation takes you. Enter all information gathered into the tool live, or, onto a note paper for subsequent entry into your systems.

Needs Assessment Interview Tool (NAIT)

GSA Associate: _____
GSA Region: _____
Date of Assessment: _____
Date of Projected Data: _____

I. CUSTOMER INFORMATION MANDATORY, ALL PROJECTS

Federal Agency: _____
Department and/or Branch: _____
AB Code(s): _____
Customer Representative(s): _____
Position(s)/Title(s): _____
Phone Number: _____
Mobile Number: _____
Fax Number: _____
E-Mail: _____
DUNS*: _____
TAS**: _____

Approval Authorities: *If no, please note authorized approving official in space provided*

Final Requirements Package	<input type="checkbox"/> yes	<input type="checkbox"/> no	_____
DID Approval	<input type="checkbox"/> yes	<input type="checkbox"/> no	_____
Customer Changes authority	<input type="checkbox"/> yes	<input type="checkbox"/> no	If no, describe limit / higher approval _____
Funding	<input type="checkbox"/> yes	<input type="checkbox"/> no	_____
OA / RWA / Market Survey	<input type="checkbox"/> yes	<input type="checkbox"/> no	_____

II. BACKGROUND INFORMATION ON CURRENT SPACE

Mandatory, All Projects

Existing Headcount

Federal Full Time Equivalent _____

Contractor _____

Term _____

Part Time _____

Do not count individuals in more than one category

Location of Current Assignment: _____

Existing Rentable Square Feet: _____

Existing Usable Square Feet: _____

Existing Carbon Footprint*: _____

Existing Lease Cost _____

**Optional: Identify method if provided; the GSA Project Planner & Visualization Tool may be used to provide a projected carbon footprint for this purpose.*

III. DOCUMENTATION

Mandatory, All New Space and In-Depth RD Projects; Optional, Standard RD Projects

Note that information and documentation listed in this section is to be gathered by the GSA associate responsible for requirements development prior to or immediately following the Needs Assessment Interview.

Attach a copy of the following items to this document if available and/or applicable:

- Staffing List/Headcount Data for requirement (Date for Headcount Projection: _____)
This list should include each authorized staff member's position/title and grade (if applicable) and differentiate between Federal FTE, Contractor, Temporary and Part-Time or Seasonal positions)
- Organization Charts
- Customer Space Standards
Check internally (GSA agency space standards library, ASR document or other) or have customer provide national space standards that govern the procurement and design of space.
- Customer Mission and/or Initiatives
Check internally with account manager for customer mission and any new initiatives.

Obtain a copy of or develop the following items if available and/or applicable:

- Floor plans of existing space
- Systems furniture installation drawings
- Agency telework or commuter survey data – *if available*
- GIS Map of proposed delineated area depicting mass transit locations and vacant federal and leased space under GSA control. *Consult Asset Manager, or use [GSA Urban Development Program Flex GIS Viewer](#)*
- Agency Strategic Sustainability Performance Plan or 2 page summary of SSPP from Account Manager if available. [Sustainability.Performance.GOV](#)
- Basic Space Program for existing location (if available, do not create)

IV. OBJECTIVES
Mandatory, All Projects

1. What is the objective or purpose of the project or move?

2. Does the customer have any special constraints, areas of special emphasis or objectives related to the new requirements that we should know about?

Constraint / Objectives	Explanation
<input type="checkbox"/> Budget	
<input type="checkbox"/> Resources	
<input type="checkbox"/> Schedule	
<input type="checkbox"/> Organizational Change	
<input type="checkbox"/> Mission Change	
<input type="checkbox"/> Space / Carbon Reduction	
	Are you considering space reduction in support of Presidential Memo requirements or Sustainability goals? <input type="checkbox"/> yes <input type="checkbox"/> no
	Do you wish to pursue space savings from desk sharing possible due to mobility (work at home programs, field work, internal work away from desk, etc.)? <input type="checkbox"/> yes <input type="checkbox"/> no
	Do you have collective bargaining units / agreements that will impact either space standards or mobility? <input type="checkbox"/> yes <input type="checkbox"/> no
<input type="checkbox"/> Other	

3. Is the customer willing to allow GSA to conduct an Employee Workplace Survey to gather data on work patterns, interest and proficiency in telework, and other information relevant to the workplace? yes no

4. How does the customer define success (customer priorities)?
(e.g.: on budget, on schedule, cutting edge design, better location, more efficient use of space)

V. NEW SPACE AND DELINEATED AREA
Mandatory, All New Space and In-Depth RD Projects; Optional Standard RD Projects

Date Space required: _____ Square Footage requested: _____
(not necessarily lease exp date) (if not determined yet, enter TBD)

1. How was the quantity of space determined? (Note: client's request for quantity of space will be used as a baseline by GSA associate when developing options to meet stated needs; GSA associate should ask client for the basis of any square footage requested, i.e. existing space, established agency standards, other method)

2. Is the client interested in occupying vacant federal space? yes no

3. Has the customer already established a specific delineated area for this requirement?
 yes no

If yes, what are the geographical boundaries?

4. Is the client willing to prioritize locations within ¼ mile of a fixed transit line or Walkscore* above 75? yes no

*Walkscore is a proprietary system used to rate the walk-ability or relative dependence on use of a privately owned vehicle of employees assigned to a given location; more information is available at: <http://www.walkscore.com/>

5. Does the customer have any special adjacency requirements (i.e. are there any requirements for or against co-locating with other federal agencies or other entities)? yes no

If yes, what are they?

6. Will the customer be moving existing furniture? yes no
If yes, have you investigated the cost of moving vs. purchasing?

7. Does the customer have any sustainability goals beyond the existing regulations, existing laws and Executive Orders in effect? yes no

If yes, what are they?

8. Does the customer wish assistance with any services related to including mobility as a way of delivering their mission?

Workplace strategic requirements engagement

IT infrastructure development planning,

Change management

If yes – note what is known about the requirement and contact your Regional Workplace Executive.

9. Does the customer wish for GSA to assist with any of these services:

IT/Network and Telecommunication Services

Local and Long Distance Telephone Service (dial tone services)

Furniture Acquisition

Furniture and Personal Property Disposal

Office Equipment Acquisition

Security Products and Services

Move Coordination

If yes – note what is known about the requirement and contact your FAS counterpart.

VI. WORKSPACE REQUIREMENTS

See Individual Subsections Below

Please note that the questions in these sections are intended to gather information from the client’s leadership or facilities perspective. In the event the client authorizes GSA to conduct a survey of its employees, similar questions will be asked and will provide a comparison of employee and leadership perspectives.

BUSINESS OVERVIEW

Mandatory, All New Space and In-Depth RD projects; As-Needed Standard RD Projects

1. Provide an overview of what your organization does and the kind of work that is conducted by the personnel in this request (typical office, customer facing, etc.).

2. How do employees typically work? (in teams, individually, mainly offsite, etc.)

3. **Generally speaking, what proportion of your employees is working in the following ways:** *Note that the client may have several groups of 50 or more employees which perform work very differently, and that difference should be captured to ensure delivery of the right kind of space. Fill in the proportion for each group of 50 or more workers who are working in distinctly different ways. For instance, personnel working with paper documents at their desk will have a different “signature” than those who are mobile three days a week. (Major groups over 50 should be similarly categorized, and there is an additional worksheet in “Section X. Additional Notes and Resources” at the end of this instrument for your use :*

Group 1: Correspondence symbol _____.Proportion of this group’s employees who work in the following ways:

- ___% **Desk-bound, interactive at desk**
- ___% **Desk-bound, concentrative**
- ___% **Internally-mobile*, interactive when at desk**
- ___% **Internally-mobile*, concentrative**
- ___% **Externally-mobile, interactive when at desk**
- ___% **Externally-mobile concentrative**

Group 2: Correspondence symbol _____.Proportion of group’s employees who work in the following ways:

- ___% **Desk-bound, interactive at desk**
- ___% **Desk-bound, concentrative**
- ___% **Internally-mobile*, interactive when at desk**
- ___% **Internally-mobile*, concentrative**
- ___% **Externally-mobile, interactive at desk**
- ___% **Externally-mobile concentrative**

“Internally mobile” refers to workers who do not travel as much outside of their primary building but are often attending meetings at various locations within the building itself away from their primary desk.

Figure 1 below expresses these different ways of working in a matrix form; see www.workplacesolutionslibrary.com for greater explanation of work patterns

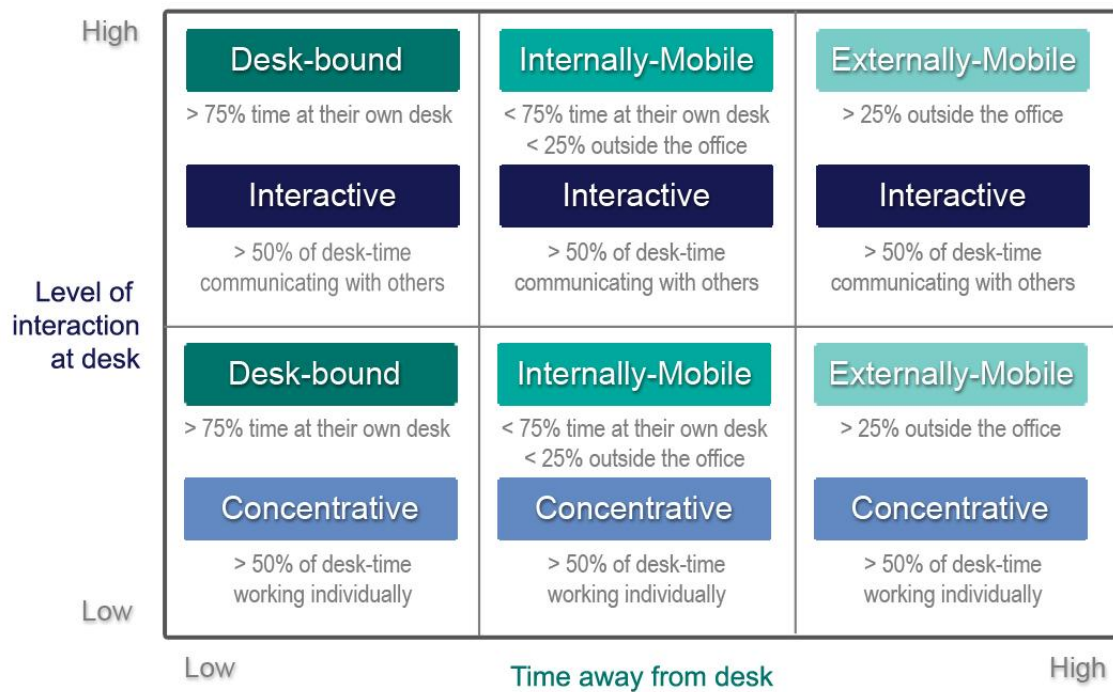


Figure 1:

4. Does the customer have an established telework programs? If so, what is their current telework participation rate (number of regular teleworkers, average number days / week)?

5. Is staff often away from their desk or out of the office as part of their normal work routine?

6. Does the customer make use of unassigned or shared seating (hotelling, reserve-able, team space, etc) currently? If so, roughly how many employees participate and what sharing ratio (number of employees / desk) do they use?

7. Which of the following mobile work supporting devices or tools does the agency currently provide to the employees considered in this request; does the agency plan to change use in the next 2 years? (Roughly what percentage of employees have or use these tools regularly or will have or use these tools?)

Tool or Devices	Percentage of Headcount
-----------------	-------------------------

	Current / Future Use
Laptop or tablet computers	____ / ____
Mobile communication devices (i.e. cell phones)	____ / ____
Remote access to work-related systems and programs (i.e. VPN, Citrix, Cloud-based applications, etc)	____ / ____
Remote meeting (i.e. webinar, instant messaging or chat, video teleconferencing, etc)	____ / ____
VOIP and soft phone applications	____ / ____
Webcams	____ / ____
Monitors or monitor configured for dual screen viewing	____ / ____

8. Would the client allow GSA to conduct an online survey of employees to gain direct information on actual work pattern and telework preferences of the staff who will occupy the future project? - **Note: Use Work / Place PMO Pre-Occupancy Employee Survey**

9. What works with the current space?

10. What doesn't work with the current space?

INDIVIDUAL WORKSPACE

Mandatory, All Projects

1. Indicate the quantity of staff and other personnel you anticipate requiring each type of individual workspace (Existing / Future).

Space Allocation Existing / Future	<i>Federal</i>	<i>Contractor</i>	<i>Other (e.g., seasonal, part-time, interns, etc.)</i>
Private Offices:	____ / ____	____ / ____	____ / ____
Workstations:	____ / ____	____ / ____	____ / ____

Total Staff:

____ / ____

____ / ____

____ / ____

1a. Can any of these individual workstations be shared by more than one person? If so, please describe below.

2. Describe any unique issues or work performed by client's staff that would require their individual workspaces to be atypical of generic office space (i.e. handling of large or large volumes of documents, specialized, bulky or high-value equipment that must remain at the worksite, processing sensitive or confidential material, etc.). This may not apply to all parts of the client's organization; differentiate between individual sub-groups as necessary.

3. Has the customer established typical or standard layouts for workstations or offices?

yes no *If yes, what are the footprint sizes for them? (i.e., 6x6, 6x8, 8x8, 7x9)*

3a Do these typical sizes support the work your agency currently does? yes no

If no, please explain

GROUP WORKSPACE

Mandatory, All Projects

1. Which internal groups need to be located near each other or near a particular support need (lobby, centralized storage, etc.)?

2. Describe the nature and frequency of meetings that occur between staff or with other outside agencies or customers (informal and spontaneous, scheduled, large/small, etc.)

3. Are your current meeting spaces adequate for these needs (number, size, features)?

4. Does the customer need conference rooms or training areas? yes no

<i>Room Name</i>	<i>Typical Meeting Size</i>	<i>Meeting Frequency</i>	<i>Video Conferencing</i>	<i>Room Currently Exists?</i>	<i>Current Performance?</i>
			<input type="checkbox"/>	<input type="checkbox"/>	

	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

5. What office support does the customer require? Are any currently reserved for individual branches, divisions or offices that could in the future be shared across the organization?

- Reception - Share? yes no
- Filing - Share? yes no
- Bookshelves - Share? yes no
- Mail Room/ Mail Station - Share? yes no
- Copiers - Share? yes no
- Fax - Share? yes no
- Shared Equipment Stations - Share? yes no

Define and quantify these requirements:

6. Does the customer require a server room? yes no
If yes, what is known about the requirement?

6a. Does the customer require advance set-up of server room? yes no
If yes, how far in advance of occupancy? _____

7. Does the customer require storage space? yes no
If yes, what is known about the requirement; has consideration been given to electronic or offsite storage possibilities?

8. Does the customer have any spaces that require special construction or maintenance?

yes no

If yes, what is known about the requirement?

BUILDING FEATURES

Mandatory, All New Space and In-Depth RD projects; Optional Standard RD Projects

1. Must the space be located on a particular floor of a building? yes no
If so, where and why?

2. Must the space be contained in one contiguous block without being split by a public corridor? yes no
3. Has the customer established a column spacing requirement? yes no
If yes, what is it?

4. Does the customer have any special HVAC requirements? yes no
If yes, please explain.

BUILDING SUPPORT SPACES

Mandatory, All New Space and In-Depth RD Project, Optional Standard RD Projects

1. Does the customer need any requirements related to access to:
Food Service: _____
Fitness Center: _____
Credit Union: _____
Onsite Health Unit: _____
2. Has the customer defined or would the customer like GSA to consider requirements for access to child care either in the facility or available nearby? yes no
If yes, what is known about the requirement?

3. Is a laboratory or clinic area required? yes no
If yes, what is known about the requirement?

4. Does the customer require space for antennas? yes no
If yes, what is known about the requirement?

5. Does the customer require any type of ware yard (loading dock, etc.)? yes no
If yes, what is known about the requirement?

6. Does the customer have any special requirements regarding handling or disposal of hazardous waste? yes no
If yes, what is known about the requirement?

VII. PARKING
Mandatory, All New Space and In-Depth RD projects; Optional Standard RD Projects

- 1. Does the customer require parking? POV: yes no GOV: yes no
 - 1a. Number of secured parking spaces required: POV: _____ GOV: _____
What is the nature of your security requirement (gate controlled, fence, visually private, other)? _____
 - 1b. Number of un-secured spaces required: POV: _____ GOV: _____
 - 1c. Does the customer require that any parking be available within a specific walking distance from the site? yes no
How many spaces? _____
How many blocks? _____
 - 1d. Does the customer have any specific requirements related to this parking? yes no
If yes, what is known about the requirement? _____
- 2. Does the customer require bicycle parking? yes no
If yes, what is known about the requirement?

VIII. BUILDING OPERATIONS
Mandatory, All New Space and In-Depth RD projects; Optional Standard RD Projects

Customer Hours of Operation

Monday - Friday: From _____ To _____
Saturday: From _____ To _____
Sunday: From _____ To _____

Would the customer consider scaling back access/utilities in sections of the facility during low-use periods of normal operating hours (i.e. days adjacent to national holidays, weekends, etc...)?

Yes No

Does the customer require afterhours access/utilities? yes no
If yes, please explain.

If yes, frequency: (hours/day) _____ (days/week) _____

Are after hours or daytime cleaning services required? Daytime After Hours

IX. SECURITY

Mandatory, All New Space and In-Depth RD projects; Optional Standard RD Projects

1. Do you feel the level of security is appropriate now? yes no
If not, what is the right level?

2. Has the customer instituted changes in their security requirements since they took occupancy of the current location? yes no
If so, what are they?

3. How does the customer want to manage employee access to the space?

4. How does the customer want to manage visitor access to the space?

5. Does the customer have any other security requirements? yes no
If yes, what is known about the requirement?

X. ADDITIONAL NOTES AND RESOURCES

* Dun and Bradstreet Universal Numbering System (DUNS) number (also referred to by GSA as the Business Partner Network (BPN) Number): Required by Treasury for Intra-governmental Payment and Collection System (IPAC), this provides a standardized interagency transfer of funds between GSA and customers' accounts for space charges. This requirement is defined in OMB Memorandum M-03-01 http://www.whitehouse.gov/omb/memoranda_m03-01

** Treasury Account Symbol (TAS) - Required by Treasury: The TAS is an identification code assigned by Treasury, in collaboration with OMB and the owner agency, to an individual appropriation, receipt, or other fund account. (These accounts are defined in I TFM 2-1500 <http://www.fms.treas.gov/tfm/vol1/v1p2c150.html>)

For the Customer letter explaining the DUNS/TAS requirements please see:

<https://gsa.box.net/shared/static/vccofho7v1.pdf>

www.workplacesolutionslibrary.com may be of great interest to both the GSA associate and the client as it presents a consistent methodology developed by National Workplace Strategy experts. In addition, the tool contains videos which may be useful for clients as they interact with their own staffs.

Additional Groups Worksheet

Group 3: Correspondence symbol _____. Proportion of this group's employees who work in the following ways:

- ___% **Desk-bound, interactive at desk**
- ___% **Desk-bound, concentrative**
- ___% **Internally-mobile*, interactive when at desk**
- ___% **Internally-mobile*, concentrative**
- ___% **Externally-mobile, interactive when at desk**
- ___% **Externally-mobile concentrative**

Group 4: Correspondence symbol ___. Proportion of group's employees who work in the following ways:

- ___% **Desk-bound, interactive at desk**
- ___% **Desk-bound, concentrative**
- ___% **Internally-mobile*, interactive when at desk**
- ___% **Internally-mobile*, concentrative**
- ___% **Externally-mobile, interactive at desk**
- ___% **Externally-mobile concentrative**

- "Internally mobile" refers to workers who do not travel as much outside of their primary building but are often attending meetings at various locations within the building itself away from their primary desk.

Group 5: Correspondence symbol _____. Proportion of this group's employees who work in the following ways:

- ___% **Desk-bound, interactive at desk**
- ___% **Desk-bound, concentrative**
- ___% **Internally-mobile*, interactive when at desk**
- ___% **Internally-mobile*, concentrative**
- ___% **Externally-mobile, interactive when at desk**
- ___% **Externally-mobile concentrative**

Group 6: Correspondence symbol ___. Proportion of group's employees who work in the following ways:

- ___% **Desk-bound, interactive at desk**
- ___% **Desk-bound, concentrative**
- ___% **Internally-mobile*, interactive when at desk**
- ___% **Internally-mobile*, concentrative**
- ___% **Externally-mobile, interactive at desk**
- ___% **Externally-mobile concentrative**

- "Internally mobile" refers to workers who do not travel as much outside of their primary building but are often attending meetings at various locations within the building itself away from their primary desk.